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I, strategist

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Abstract

An autoethnography is offered of a head of an academic department and middle manager writing a strategic plan he did not believe was necessary or would have any beneficial effects on colleagues within the department. The notion of the reluctant strategist is offered. What strategy work do such actors undertake? Reluctant strategists write strategic plans as defensive texts. Defensive texts, I explain, are authored and structured to repel deeper engagement and questioning; to ensure that they are successful, they act through presenting their content as authoritatively assured. Strategy work in organizations is advanced as an affective accomplishment. In writing strategic plans, strategists are sensorially affected by their relational encounters, moving them to act. This personal account of strategy work shows that strategists are not just senior managers, middle managers or strategy consultants; they are affected actors who can be confused, sceptical, full of doubt and who can resist.

Keywords

Affect, autoethnography, defensive text, reluctant strategist, strategic plan, strategists

> *During my first one-to-one session with the dean of the business school, I, a newly installed but nervous head of department, was informed that I needed to produce a strategy. I was told it should be four or five pages long. It was not made clear to me why I needed to produce one. As a strategy academic, while I had critiqued many strategic plans, I had never actually written one. What did the dean understand by strategy? How would I satisfy their requirements? What impact would the strategy have on departmental colleagues? Would the task expose me as a fraud?*

Research that focuses on the practice of strategy has made substantial strides in legitimizing the move away from seeing strategy as something possessed by organizations to conceptualizing it as something people, typically 'strategists', do (Balogun et al., 2014; Jarzabkowski et al., 2007; Vaara and Whittington, 2012). And yet, the question posed by Clegg et al. (2004: 21), 'what do strategists do?' remains elusive. Related, but largely unexplored questions that this article pursues are: 'how does the "doing" of strategy affect it?' and, 'how are those "doing" strategy work affected by it?'. This autoethnography addresses the call made by Balogun and Rouleau (2017) for research that focuses on strategists' day-to-day organizational life and for scholars to explore other research

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methods that might 'alter common assumptions on the nature of middle manager strategic roles and work' (p. 128). Autoethnography also neatly addresses Jarzabkowski et al.'s (2021) invitation to scholars to 'take a more active role in field sites, in deciding and explaining what practices are strategic (p. 1)'. This is necessary, they assert, because research into strategy as a practice is suffering and needs reinvigorating (Jarzabkowski et al., 2021).

I offer an account of middle manager strategy work (Jarzabkowski et al., 2022) through an analysis of a head of an academic department writing a departmental strategy. Strategy work refers to all sociomaterial activity that constitutes 'strategy' in organizations. Strategy work is accomplished in different and multiple ways (Mantere, 2017), one of these ways, something we know little about is when a head of department/middle manager must produce a departmental strategy they do not feel is necessary. While there are existing studies of resistance in the strategy literature (e.g. Ezzamel and Willmott, 2008), I offer a new conceptualization, that of a *reluctant strategist* writing a strategic plan as a defensive text. I also articulate the new idea of a *defensive text.* A defensive text is authored and structured to repel deeper engagement and questioning; it acts through presenting its content as authoritatively assured to ensure it is successful. In writing the strategy as I did, I crafted what Mintzberg and Waters (1985) term an 'unconnected strategy' (p. 265). They identify that such rarely acknowledged strategies are produced when '[o]ne part of the organization. . .a subunit, sometimes even a *single individual*' (emphasis added) undertakes strategy work separate from or only loosely coupled with that going on elsewhere. It is this empirical and theoretical puzzle that is my focus.

Autoethnography (Ashcraft, 2017; Learmonth and Humphreys, 2011; Parker, 2004; Tienari, 2019; Weatherall and Ahuja, 2021; Winkler, 2013, 2018; Zawadzki and Jensen, 2020) is the method employed in this research. This is the first time, to my knowledge, that such an approach has been adopted in what may be labelled a 'strategy-as-logic of practice' (Sandberg and Tsoukas, 2011)[1] study. Strategists' personal accounts of their strategy work are missing and this weakens our claim to have got closer to understanding how strategizing in organizations is actually accomplished. Without autoethnographic studies that consider how 'we', strategy academics, 'do' strategy, we are in danger of perpetuating what Knights and Morgan (1991: 255) see as the intellectual role of the 'legislator', where we tell practitioners whether what they are doing is 'real' strategy or not. An autoethnographic approach, such as adopted here, helps to expose how 'strategy' and 'strategic' have become terms used to signal importance, but also represent a certain grandiose meaninglessness (Alvesson, 2013; Gjerde and Alvesson, 2020), where substantive work is replaced with an overwhelming superficiality couched in what is assumed to be the language and practice of 'real' managers.

Autoethnographies are how 'academics tell stories about their own lived experiences' (Empson, 2013: 233; Knights and McCabe, 2016; Tienari, 2019; Winkler, 2015). It is important that we do this because, while we may be quick to interrogate the actions of others, we have been less keen on turning a critical lens on ourselves (Alvesson and Einola, 2018; Lapadat, 2017). Indeed, there has been a reluctance in subject our experiences to reflexive critical engagement, with something of a taboo having arisen around the idea (Anteby, 2013; Ashcraft, 2008). However, our 'own relations of ruling also beg for critique' (Ashcraft, 2017: 37). With our places of work resembling more and more a neoliberalist ideal constituted by a rampant managerialism (Creaton and Heard-Lauréote, 2021; Gjerde and Alvesson, 2020; Jones, 2022; Nordbäck et al., 2022; Parker, 2004, 2014; Zawadzki and Jensen, 2020), a growing individualization of responsibility (Elraz and Knights, 2021; Kiriakos and Tienari, 2018) and the seemingly unstoppable growth of what Ashcraft (2017: 38) terms 'parasite' industries (e.g. journal rankings), autoethnographic works enable us to speak knowledgeably to wider audiences than just ourselves (Zawadzki and Jensen, 2020).

Autoethnography enables several novel contributions. To the middle manager strategy literature, I advance and explicate the notion of a reluctant strategist. I show how a reluctant strategist told to produce a strategic plan authors one as a defensive text. A defensive text is a new construct in management and organization studies (MOS), and shows how the strategy work necessary to produce strategic plans is an affective undertaking. In detailing the actions that produced a defensive text, the study provides empirical evidence of what Gjerde and Alvesson (2020) discern as the 'umbrella-protector' subject position middle manager strategists can embody. These insights show something of the doing strategy, and how 'doing' strategy work is affected by and affects strategists. As the autoethnography sets out, my aim in writing a strategy as a defensive text was for it to have no subsequent effect on my departmental colleagues. Practical umbrella-protecting in this instance arose through my tactical actions aimed at producing a strategic plan that would have minimal impact on staff and require them to do no additional work. In addition, the work speaks to the growing literature focussed on middle managers in academia. It demonstrates empirically how middle managers cope (Creaton and Heard-Lauréote, 2021) with some of the 'strategic' activities required of the modern head of department.

Strategy work is shown to be an affective undertaking that seeks to draw 'the future into the present' (Clough, 2009: 49). Strategic plans affect and are affected by those who encounter them (Clough, 2009). In common with other authors (e.g. Clough, 2009; Massumi, 2002; Thrift, 2007), affect is not conceptualized as an elemental emotional state (Ott, 2017). Rather, it is understood as a relational, anticipatory and intense force-like sense (Ashcraft, 2017; Beyes and Steyaert, 2021; Clough, 2009; Massumi, 2002). Thrift (2007: 116) writes that '[a]ffects are not feelings, they are becomings'. In ways both intended and unintended, strategy work affects those involved, moves them to act and constitutes their ongoing becomings (Gherardi, 2017; MacKay et al., 2021). Affect was chosen to help theorize this study because it aligns with autoethnography, in that it enables the reflexive consideration of forces that move one to act.

Middle manager strategy work

Middle manager strategy research has tended to focus on how strategic change is interpreted (Floyd and Wooldridge, 2017). This arose from an interest in how middle managers implement the strategies formed by organizational elites (Christensen et al., 1965; Huy, 2011). In more recent times, the implementer view of middle managers has been questioned, with strategy scholars constructing a more rounded and complex understanding of middle managers (Balogun and Johnson, 2005; Burgelman, 1994; Currie and Proctor, 2005; Hoon, 2007; Pappas and Wooldridge, 2007; Rouleau, 2005). Yet, we still know little about what middle managers actually do when they are acting as affected strategists (Beyes and Steyaert, 2021; Gherardi, 2017). There is a tendency in the literature to see them solely as adjuncts to the work of other organizational strategists, such as senior managers (Canales, 2013; Huy, 2011) or strategy consultants (Whittington et al., 2011).

Research that centres the practice of strategy has achieved one of its aims in acknowledging that researchers should not merely investigate what strategies organizations 'have' but need to examine how strategists 'do' strategy (Jarzabkowski et al., 2007; Rasche and Chia, 2009). However, we possess scant knowledge about how the 'doing' of strategy unfolds and, how 'doing' strategy also 'does' strategists (MacKay et al., 2021). Balogun and Rouleau (2017: 127), among others (e.g. Rasche and Chia, 2009; Whittington, 2007), argue that such research needs to 're-socialize' strategy, as this holds the promise of re-connecting it with the way strategy is accomplished in the rich contexts of organizational activity. Whittington (2007) advocates for the inclusion of a sense of irony and 'an appetite to uncover the neglected, the unexpected and the unintended. The overall effect is to broaden radically our vision of what strategy is' (p. 1577). This autoethnography offers

a glimpse into this kind of strategy work. It centres an actor engaged in authoring a strategic plan reluctantly and, while enmeshed in the political manoeuvrings of everyday managing and organizing (MacKay et al., 2021), largely divorced from other strategizing taking place within the organization (Mintzberg and Waters, 1985).

An authored strategic plan is one outcome of strategic planning, and is an activity is long-associated with strategic management and that forms the central act this present research circles around (Mintzberg, 1994; Spee and Jarzabkowski, 2011). However, despite the ubiquity of strategic plans in organizations and on firms' websites, there is a lack of research that investigates how they are authored and how they act. Langley's (1988) work of over 30 years ago remains the most comprehensive study on the topic. Langley (1988) identified four roles of formal strategic planning: a public relations role, where it is intended to impress or influence outsiders (p. 43); an information role, where it provides input for strategic visions (p. 43); as consensus forming, its role is akin to group therapy (p. 44); and when strategic planning seeks to bridge the gap between formulation and implementation, its role is to direct and control the actions of those to whom it is aimed (p. 45). Moving on, Abdallah and Langley's (2014) concern is with how strategic plans contain ambiguous statements that both permit and enable organizational actors to creatively consume them, allowing for meaningful interpretations to be formed. Abdallah and Langley's (2014) focus though is on how the texts were received, 'not on the *process* of' (p. 243 *italics in original*) their generation. Through centring the process by which a strategic plan is crafted, this study addresses a significant shortcoming in strategy research adding to and extending this work.

Strategy research tends to focus on radical change contexts (Jarzabkowski et al., 2019; Lozeau et al., 2002), which can lend itself to comfortable theorizing, but can paint a distorted picture of how strategy work is experienced by practitioners. Most are not undertaking revolutionary strategic change; they are muddling through (Lindblom, 1968). This kind of day-to-day strategy work is mundane and can be boring (Balogun and Rouleau, 2017), but should not be ignored by researchers, as through studying it we can begin to address some of the many questions that have eluded us about how strategy is actually experienced in organizations.

What this means is that if we really want to craft insight into what strategists do (Clegg et al., 2004), we need to rethink what we understand strategy work to encompass and what we focus on in our investigations. If we fail to do this, we will perpetuate existing assumptions and our understandings will not advance. Middle manager strategy work can be tedious, seemingly absurd and separate from and not feed into the broader strategizing actions undertaken at organizational centres. To say the opposite is to propose that it is always interesting, possesses a clear logic and aligns with organizational strategy work in ways that middle managers clearly understand. Such a utopian view has emerged from strategy academics who have acted as legislators passing judgement on whether what actors do aligns with how strategy is presented in our textbooks (Knights and Morgan, 1991).

Autoethnography

To understand how middle manager strategy work unfolds in organizations, autoethnography offers a novel approach. Autoethnography (Ellis and Bochner, 2000; Learmonth and Humphreys, 2011; Tienari, 2019; Winkler, 2018) affords researchers the opportunity to produce reflexive accounts of their organizational becomings (Humphreys, 2005; Kiriakos and Tienari, 2018). In short, autoethnographies allow us to tell our own tales. While such work can poignantly relate experiences that we might otherwise neglect, one risk is that they can also descend into nauseating self-introspection and navel-gazing. Indeed, the chief danger with autoethnographies is that what can be insightful self-reflexivity tips over into self-indulgence, narcissism, superficiality and

sensationalism (Empson, 2013; Humphreys, 2005; Lapadat, 2017; Winkler, 2018). To avoid this, it is important that autoethnographies should not only be plausible and authentic renderings, evoking in readers a sense that they are in a dialogue with the author, but they should also provoke (Humphreys, 2005; Kiriakos and Tienari, 2018).

If autoethnographies are to have a role in MOS it is because they enable researchers to produce insights about phenomena not achievable through other means. As academics when we undertake autoethnographic research we are writing about ourselves for audiences that are like us. Hence, my target audience for this article is fellow strategy academics, colleagues who research middle managers in MOS and those researchers interested in autoethnography, or the politics of academic life. To evoke a sense in readers that they are 'there' with the autoethnographer is the least that should be expected. Readers need to learn something about the experiences of the author and, via analytical abstraction (Anderson, 2006; Learmonth and Humphreys, 2011), their work lives that surprise them and provoke them to reflect on their worlds in new ways. The risks of self-indulgence, narcissism, superficiality and sensationalism are attended to by positioning this present research as an analytic autoethnography (Anderson, 2006).

Anderson (2006) identifies analytic autoethnography as comprising three key points that locate the autoethnographer as: '(1) a full member in the research group or setting, (2) visible as such a member in published texts, and (3) committed to developing theoretical understandings of broader social phenomena' (p. 373). I was a full member of the department of which I was head, I am present in the current text, and, the article is committed to developing theoretical understanding of middle manager strategy work. In contrast to purely evocative autoethnographies, analytic autoethnographers focus their reflexive considerations on developing:

> an awareness of reciprocal influence between ethnographers and their settings and informants. It entails self-conscious introspection guided by a desire to better understand both self and others through examining one's actions and perceptions. . . (Anderson, 2006: 382)

Research methods 'have effects; they make differences; they enact realities; and they can help to bring into being what they also discover' (Law and Urry, 2004: 392–393). What is needed are approaches that allow insights to be crafted that preserve this, rather than obfuscate it in methodological straightjackets. Where no separation between subject and object exists (Ashcraft, 2017), the autoethnographer is constituted and surrounded by affect: potentials, becomings, intensities that move them to act (Clough, 2009; Massumi, 2002; Thrift, 2007). The decisions I made when the events I relate took place, and in writing-up these experiences through crafting this account are affective and have made a difference to how my narrative unfolds. The conditions of reality surrounding its creation were not fixed and pre-determined, so consequently the methods I chose to investigate and (re)constitute my own experiences needed to be capable of handling complexity and messiness (Sandberg and Tsoukas, 2011).

In autoethnographic research, both the researcher and the object of the research 'are produced as outcomes of the practices of research' (Alcadipani and Hassard, 2010: 429). Ashcraft (2017: 46 *italics in original*) emphasizes 'the point is not simply that knowledge claims *emanate* from certain relations but, also, that they *enact* said relations, and these enactments gather steam and radiate consequence over time and space'. In autoethnography, this co-production unfolds simultaneously as I, the strategy I authored and this rendering I offer become inseparable; they are affectively active in the constitution of one another. I could not create a departmental strategy without at the same time constituting my identity as a strategy academic, middle manager and head of department. In addition, while writing-up and presenting this work I am also engaged in identity work around being and becoming an academic focussed on strategy and organization (Tienari, 2019).

Autoethnography enjoys a contested relationship with the idea of generalizability. Anderson, in the context of analytic autoethnography, writes that one of its value-addeds is not only its plausible rendering of the social world under investigation but also its transcending of that world 'through broader generalization' (2006: 388). However, in MOS, the established convention is for autoethnographers *not* to claim generalizability for their work (e.g. Kiriakos and Tienari, 2018; Learmonth and Humphreys, 2011; Tienari, 2019; Winkler, 2018). Anderson's autoenthographies tend to see him located away from his regular workplace (skydiving, for example (Anderson, 2006)), whereas MOS autoethnographies typically focus on specific aspects of academic life, which are highly particular to the autoethnographer. In such circumstances, it would be wrong, I believe, to claim generalizability as, although relatable to other contexts, my experiences are not the same as those of my readers (Czarniawska, 2003). Consistent with Tienari (2019: 587), my ambition is that my research may 'open up possibilities for scrutinizing' how middle manager strategy work is undertaken 'more generally' than to claim any form of generalization.

Covert autoethnography

Autoethnographies unavoidably implicate others in their telling (Lapadat, 2017; Winkler, 2013). I cannot tell my story without involving others with whom my life interrelates (Winkler, 2018). My becoming as a strategist (Thrift, 2007) impacts upon and is impacted by a senior manager to whom I reported (dean), my senior leadership team (SLT) colleagues and staff in the department of which I was head (Tienari, 2019). The encountering of political tensions during the authoring of this research, to which I allude, resonates with what happens during our normal working lives where diverse moralities produce ethical dilemmas (Alvesson and Einola, 2019; Lapadat, 2017) necessitating affective moral judgements on a daily basis. As a head of department and senior team member, ethics, both formal and informal, impacted on much of what I did. In writing this autoethnography, I reflexively acknowledge I can only ever relate a partial account of my experiences and that those who are involved in my retelling, the dean, departmental colleagues, fellow heads of department, might view and reflect upon the actions I relate in entirely different ways (Tienari, 2019). As Denzin (2009: 143) observes '[t]he politics of evidence cannot be separated from the ethics of evidence'.

Consequently, one limitation autoethnographies contain is their one-dimensional portrayal of those the autoethnographer interrelates with. This is a difficult problem to surmount. I accept that throughout my autoethnography the dean, in particular, could come across as too simplistic a character, to whom I deny the rich array of motivations I craft for myself. I am aware that I judged and assigned motives to them that they may not recognize. And yet, how could I do differently? I can only write from my perspective and from no-one else's. Indeed, I feel it would be wrong to claim I am writing from some other's point-of-view, as I can only write reflexively from my own (Winkler, 2013). Winkler (2018: 238) is correct in identifying that the re-telling of stories from our lives is in many ways an act of memory (Sparkes, 2007). The acts of memorizing I completed were supplemented by my contemporaneous notes made at the time of many of the events that I relate, the real-time documents I cite and the email I include. I also undertook a form of reflexivity Anderson (2006) advocates for and that Tienari (2019) practised when crafting his autoethnography. I sent early drafts of the paper to colleagues who went through similar experiences as I at an earlier or the same time and asked them to judge; 'have I been fair?'. In addition, the feedback I received from conference and seminar presentations enabled me to examine and re-examine my actions and assumptions (Anderson, 2006).

In their ethnography of workplace dispute resistance at Keele University, Knights and McCabe (2016: 538) defend their use of covert research through arguing that 'informed consent is "neither

possible nor desirable" in certain sites and occasions and, in particular, in qualitative and ethnographic types of research that seek to avoid interfering with "natural" forms of behaviour'. Covert research highlights that ongoing ethical decisions are the responsibility of the researcher, who must attend to them in ways they feel comfortable with and can defend (Lapadat, 2017). This form of relational ethics (Winkler, 2018) highlights the relationships between autoethnographers and those whose actions and decisions they draw upon to construct their narratives.

Certainly, as a researcher I did not want to interfere with the behaviours I encountered around me, though of course, I was contributing to them as a head of department. Had I done so by explaining that I was planning to write about my experiences of authoring a strategy for the department I was head of, I feel sure behavioural changes would have occurred. For example, after I had submitted the strategy, it was not mentioned again by either the dean (who instructed me to produce it) or any other of my SLT colleagues. Had they been aware that my experiences were also my data, I feel sure there would have been some follow-up. Therefore, the ethics I adopted were those that required an affective 'engagement in our relations with others because then we are confronted with choices that we feel and that affect others rather than simply obeying rules or living up to utilitarian or virtuous ideals' (Knights and McCabe, 2016: 539).

Being and becoming a strategist

I had worked at Counties since 2007. As a lecturer in strategic management, my original interest and positioning within strategy scholarship had been in the strategy as practice field, but over time I had found myself becoming interested in more critical approaches to research, particularly those that favoured a communication perspective. Emerging from the linguistic turn (Deetz, 2003), the communication as constitutive of organization (CCO) (Cooren et al., 2011) research move became one to which I was increasingly drawn. CCO privileges a view of communication as formed by an interplay of conversation and text. Conversation being the spoken word, texts being anything that isn't verbal; so authored documents are texts, but so are ideas, notions, tools, theories, frameworks and so on that become the bases upon which conversations are formed. Agency, from this perspective, is seen as an interplay of talk and text. So, texts can act, make a difference, as much as talk. Therefore, investigating how texts like strategic plans are authored and how they are intended to act is a topic worthy of study.

I had been in the strategy and marketing department (SMD) for all of my time at Counties. I had previously worked with three different HoDs, one of whom had done the job twice while I'd been there. The HoD post was awarded for a 3-year period and towards the end of the term, internal adverts were published seeking expressions of interest in the role. During my time at Counties, this interest was generally weak, with most requests for expressions of interest receiving none – hence one of the previous HoDs doing the job twice. The main reasons for a lack of interest in the post were the perception that undertaking the role would mean that one's personal research would suffer (Creaton and Heard-Lauréote, 2021), and the view among colleagues and myself that the dean operated in a highly managerialist tone, which I explain below.

I had never seriously considered expressing any interest in the position and when the outgoing HoD had twice approached me to ask if I would be interested in taking over from them, I'd rejected the suggestion (see Jones, 2022). However, I began to reflect on whether I had dismissed it too hastily. I began to see the possibilities of undertaking such a management/leadership role as having some benefits. I reasoned that the experience would give me sharper insight into managing, which was of course something I was teaching. I felt doing a 3-year stint would mean 'I'd done my bit' for a while and I would then be able to revert to my former role of researcher and teacher. Also, when I was approached about applying for the HoD position, it was mentioned that the experience

would be good for my career and promotion prospects. I decided that I would give it go, assuming that I could put up with anything for 3 years; this reasoning proved to be incorrect.

I became HoD for the SMD at Counties University in September 2016. As HoD, I became a member of the faculty's SLT and reported directly to the dean. (Despite my SLT membership, I considered myself a middle manager. This was reinforced in July 2017 when a re-structuring saw the HoDs (four in total) report to the newly created head of school position and our membership of the SLT was scaled back. This decision was subsequently reversed in November 2017 when the head of school stepped down from their position.)

A key relationship in my HoD role would be with the dean. The previous HoD, along with others in the faculty, had cautioned me regarding the behaviour of the dean. They had a reputation for micro-managing and despite much talk about the autonomy I would have in my role as HoD, I was told by more experienced colleagues that there would be no autonomy, and that I would have to do what the dean wanted. I was also warned of their tendency to focus their displeasure on specific individuals who would be singled out for criticism (on 11 October 2017, and while crafting an early draft of this article, I was informed that the dean had resigned from Counties with immediate effect and would not be serving any notice period). I was told this aspect of the dean's displeasure was known among colleagues on the SLT as being placed on the 'naughty step'[2]. Previous HoDs and full professors had received or had witnessed others receive this treatment.

The first appointment I had put into my diary was a 'one-to-one' meeting with the dean scheduled for 3 October 2016. It did not follow the path I had expected. I assumed that a one-to-one meeting meant that I would be asked about how I had settled into the role and would afford me an opportunity to raise issues about which I wished to talk. The meeting turned into an intense (Clough, 2009; Massumi, 2002) half hour, involving the dean tracing their pen down a list of SMD academics one-by-one and asking for an update on what each of them was doing regarding research output that could be included in the school's 2021 Research Excellence Framework (REF) submission and in teaching terms. Towards the end of the meeting the dean told me that I needed to produce a departmental strategy by the end of October, and that it 'should be four or five pages long'. It was not made clear to me why I needed to produce an SMD strategic plan or how it would be used. Regrettably, I neglected to ask and passively accepted the task.

I was vaguely aware that previous departmental strategies had been produced and could recall having commented on them when they were in draft stages. Yet, despite being a strategy academic, I had never understood why they had been produced or been convinced that our department of 17 academics and a department secretary needed a strategy (Winkler, 2015). I failed to locate a copy of the 2015/2016 strategy and the SMD secretary could not find a file copy, so we had to contact the dean's secretary and ask for a copy, which was emailed to me. During my time as a strategy academic, I had critiqued many strategies and I had facilitated their crafting, but I had not written one. Having to write a strategic plan made me feel nervous and somewhat apprehensive. I was worried that I may be exposed to the dean and to colleagues in the department as some sort of fake or charlatan once my knowledge of 'real' strategy became available for all to see and judge.

I reflected on the task that lay ahead and quickly concluded that I could not see any value to the department of it having a strategy, as I felt it would have negligible impact on the work already being done. Considering what I had been told and from my own observations of the behaviour of the dean, I resolved to write a strategy that would exert textual agency (Cooren, 2004), but its acting would be restricted to defending and rebutting, meaning its primary role would be to protect SMD academics (Gjerde and Alvesson, 2020) from what I judged was the dean's propensity to micro-manage (Clough, 2009). To be successful in this objective, the strategy needed to be credible.

The previous HoD and author of the 2015/2016 strategy was also a strategy academic, so I reasoned that following the template established by that year's text would be my best option for producing a strategy to fulfil my aim of it acting defensively. The SMD strategy for 2015/2016 spreads to just over two pages in length. It begins with a paragraph headed 'Strategic Narrative' that summarizes the plan, and then moves into a section headed 'SMD Objectives for 2015–16'. The main subheadings are:

- SM1 (strategy and marketing 1) Support curriculum development of UG programme.
- SM2 Support curriculum development in other areas (e.g. Executive Education and MBA) as appropriate.
- SM3 Develop (at least) two research clusters, and contribute to research clusters led by other departments.
- SM4 Continue to develop [XXX Institute] as a successful research centre, and support research centres led by other departments.
- SM5 Explore opportunities for external engagement.
- SM6 Develop best practice around workload management across departments.

(Counties, 2015)

I figured that following the structure used the previous year and sticking to the genre conventions that had been established, would enhance the chances of the plan being accepted by the dean, but I needed to populate it. As I considered that all the SMD academics had full workloads and were in fact over-allocated particularly with regard to their teaching and administrative workloads, I was determined that I would not include anything in the strategy that required staff to do any extra work to that agreed with the previous HoD during the June and July annual review meetings. These mapped out each academic's year in terms of teaching, research, administration and other tasks. So, I built the plan on activities colleagues were already carrying out and were committed to. My reasoning was that if academics in the department were doing these anyway, incorporating them into a strategy would have little effect on them, but would suggest to the dean that a departmental strategic plan was being 'implemented'.

Having been told to create a strategy, the figurative idea of 'strategy' as a text (Cooren et al., 2011; Spee and Jarzabkowski, 2011) that I materialized was shaped by how I assumed 'strategy' was understood by the dean (Clough, 2009; Cooren, 2020). Therefore, the idea of 'strategy' I assigned to the dean has broader consequences, in that its materialization not only alters it, affecting it, but it also begins to affect those it impacts. So, my strategy work will be affected and shaped by my assumptions of the meanings I suspect the dean attributes to what they called 'strategy'. Strategy work does not unfold in organizational vacuums; hence my reasoning is also affected by practices outside of the immediate strategizing. Specifically, by the stories I have been told by colleagues about the dean (MacKay et al., 2021). I became affected by what I judged to be the dean's managerialist motivations and understanding of strategy, which had a force-like affect on my actions (Ott, 2017). Furthermore, progressing the departmental strategy as a plan with SMD colleagues resulted in 'strategy' having additional affects and was itself ongoingly affected by the strategy work its production motivated.

I trawled through each colleague's (nine pages) annual review form and identified actions they had committed to and resolved to build the strategy up out of these. Under the sub-heading 'Objectives, including study leave (SL)/research days (RD) plan (for next year)' are activities agreed to, so I drew from them. I focussed on intended journal and planned conference submissions, academic leadership activities (e.g. chairing conference tracks, journal special issue editorships and editorial board memberships), administrative roles (such as programme lead roles), and

other activities required of the modern academic (applications for Higher Education Association fellowships and senior fellowships, external funding submissions, etc.). I did not include all the actions identified for each academic as, though I wanted the strategy to be persuasive (i.e. to show abundant activity with outcomes attached), it also had to be something for which each academic could potentially be held to account. In our annual review meetings, we tend to be ambitious and maybe a little unrealistic, and as the strategic plan was going to the dean, I did not want them to take any punitive action against specific individuals, putting them or the department on the 'naughty step' if objectives were not met.

Having rendered notes from the annual reviews, I nervously set about writing my first strategic plan. I planned to utilize a departmental meeting scheduled for 19 October 2016 to explain to colleagues what I was doing. Following the meeting, I intended to send them the draft text for comment and ask for feedback to be returned within a few days. Then, I would re-draft the strategy before submitting it to the dean, thus meeting the end of October deadline that had been imposed.

My draft followed the template of the previous strategy, but with some changes. I added an initial paragraph that I labelled 'Departmental Context', this was because I felt the need to explicitly record the significant changes the department had recently undergone. A professor and the previous HoD had both left Counties to join another university at the end of August 2016, and a senior lecturer on a fixed-term contract had joined us (over the next few months we also lost a further two senior academics, a research associate and the long-serving departmental secretary – I spent much of my time during 2016/2017 on recruitment matters). I characterized the department as undergoing a period of significant change.

Following this scene-setting paragraph, I produced a one-paragraph 'Strategic Narrative' that summarized the objectives for 2016/2017. The major section of the strategy was headed 'SMD Objectives 2016/2017'. As done in the 2015/2016 strategy, I then set out the four objectives for the department for the year:

- Objective 1: Contribute to the development of the undergraduate curriculum.
- Objective 2: Contribute to the development of the postgraduate curriculum as appropriate.
- Objective 3: Contribute to the research profile and environment of [the Faculty].
- Objective 4: Contribute to the development of external engagement opportunities.

(Counties, 2016a)

As I had drawn on each individual academic's annual review, I was able to be quite specific with my strategic plan. For example, under Objective 3, one activity/task was 'Produce REF-able research output' with the Deliverables/Outcomes stated as;

> SMD colleagues will work towards producing REF-able output for this year and up to the next REF. SMD staff expect to submit 17 papers (some co-authored within SMD) to 4* journals and 9 papers (some co-authored within SMD) to 3* journals based on ABS Rankings during 2016/2017. Development work will also take place to ensure that further 4* and 3* submissions are in train for the time leading up to the next REF.
>
> (Counties, 2016a)

Writing a strategy materializes futures in presents (Clough, 2009) and is an affective, multi-sensorial practice (Beyes and Steyaert, 2021; Gherardi, 2017) that sees strategists working under intense pressure (Massumi, 2002; Ott, 2017). This pressure resulted in me sending to colleagues for comment my one-and-a-half-pages of rough notes, rather than my carefully crafted three-and-a-half-pages draft strategic plan. Clearly confused, some commented on it as if it were the full strategic

plan. One senior colleague asked if they'd received the correct document. I checked and of course realized my mistake. I sent the intended text, the draft strategy, to everyone on 20 October with a suitable apology 'Colleagues, Apologies for the previous email related to this. I sent my notes not the draft document! Attached now is the draft. Your comments are appreciated. Many thanks, Alex' (email 20 October 2016).

I anxiously awaited feedback. Five of my SMD colleagues were strategy academics and included a full professor of strategy and international management, so I experienced some anxiety awaiting their views. Thankfully, the comments I received were constructive. I think they understood my position and what I was trying to achieve, namely, produce a strategy that would be accepted, but that did not impact upon them.

I was able to incorporate many of the suggestions I received into the final draft of the strategy. The feedback was extremely useful in adding detail; so, for example, against the Activity/Task under Objective 3 'Produce REF-able research output', as well as the above paragraph that remained unaltered, two short additional paragraphs were added.

> SMD currently employs three visiting Professors on a part-time basis. Greater use will be made of these in terms of how they offer guidance and support to colleagues in the process of submitting papers to ABS 3 and 4 ranked journals. (Counties, 2016b)

And,

> SMD staff continue to progress and develop links with national and international researchers to work on joint projects to produce outcomes aimed at ABS 3 and 4 ranked journals (e.g. [list of SMD staff engaged in this activity]).
>
> (Counties, 2016b)

The final text, entitled 'SMD Strategic Plan, October 2016', came in at four pages and was emailed to the dean's office on 27 October 2016. From that time to my leaving Counties in April 2018, I received no feedback or consequential remark from the dean, or from anyone else. I assume it had been accepted, in that I heard no comment that suggested otherwise, it did not require any SMD academic to undertake activities that did not appear in their annual reviews – which, of course, was my intention. From my perspective, I had successfully produced a strategic plan as a defensive text to act as proof of process, not for implementation. And, I had also signalled my 'leadership' and 'strategic activity', however emptily, as an SLT member. By producing a plan, I had behaved 'strategically' in the eyes of others and, therefore, had reinforced my senior leadership credentials.

I did not serve the 3 years as HoD I had originally intended. I took on the role in September 2016, in October 2017 the dean left Counties, in November of that year the dean's appointed head of school stepped down, along with two senior administrative staff. What I witnessed in the run-up to these changes led me to seek employment elsewhere. While I believe the replacement dean and other senior appointments made began to address many of the problems that characterized the previous dean's tenure, I had already made the affective decision to leave. I left Counties at the end of April 2018. As HoD, I learnt more about management and much about the management of universities in this time of heightened managerialism and rising neoliberalism (Ashcraft, 2017). Doing a job I had no real aspiration to do was a strange experience. Stranger still, is that despite my above analysis I gained a huge sense of satisfaction in doing the basic, day-to-day managerial aspect of the job (Creaton and Heard-Lauréote, 2021) – helping, or at least trying to help, existing and the many new staff we employed to do the rewarding and worthwhile work they were all intrinsically motivated to do.

Discussion

Autoethnographic works enable us to craft insights that are not available through other means. Therefore, in response to Clegg et al.'s (2004: 21) question 'what do strategists do?', and my own supplementary queries: 'how does the "doing" of strategy affect it?' and 'how are those "doing" strategy work affected by it?', several important contributions are claimed. My actions from being instructed to produce a departmental strategy were those of an unwilling and disinclined actor, and from this I propose the notion of a reluctant strategist; one who undertakes strategy work but is unconvinced of its worth and purpose. First, reluctant strategists contribute to strategy in ways we are largely unaware of. In this case I produced a strategic plan as a defensive text. Such a role for texts has not been identified previously and adds to the agency identified for them (Cooren, 2004; Langley, 1988). Defensives texts are designed to act through closing-off further discussion and the second contribution I claim, adding to the roles Langley (1988) identified for strategic plans. Second, strategy work has been shown to be an affective undertaking, where it affects those accomplishing it, but not necessarily in ways intended or assumed. Last, my autoethnography is positioned as an ironic provocation intended to provide readers with novel ways of 'seeing' familiar phenomena.

Reluctant strategists

That I was not convinced that a departmental strategy was either needed or wanted made me, a strategy academic, a reluctant strategist. Reflecting upon this also led me to speculate that my situation was unlikely to have been unique – a speculation confirmed by audience members when the work has been externally presented. To enhance our knowledge of strategists and strategy work, we need to know about what other acts reluctant strategists undertake. With strategy work and strategy talk becoming ubiquitous in organizations, 'producing a strategy' seems to have become a default position for many – I lost count of the number of 'strategies' Counties University had. This is, I feel, one manifestation of the neoliberal managerialism (Kiriakos and Tienari, 2018; Knights and Morgan, 1991; Nordbäck et al., 2022; Zawadzki and Jensen, 2020) that infests many business schools.

My reluctance stemmed from me not seeing the value to the department of having a strategy. I concluded that the departmental strategic plan I was asked to write was required for the dean, so that they had a controlling text to assist them in their instrumental managing (Mintzberg and Waters, 1985). I accept that I have constructed a trope here where I adopt a somewhat heroic identity and have crafted the dean as something of an 'evil' presence I resolved to protect SMD colleagues from, and that this inevitably simplifies the context I was in. And yet, my conjecture is that this situation, where a middle manager is asked to write a strategy by a senior manager, and where the middle manager can conceive of no benefit to their department from doing so, and therefore constructs a role for themself as a defender against an imagined (managerial) foe, is not uncommon. Consequently, my strategizing actions were focussed on protecting departmental colleagues from the unnecessary work I felt could result from acceding to the dean's request (Gjerde and Alvesson, 2020).

Defensive texts

What strategic texts will reluctant strategists seeking to protect colleagues write? The notion that a strategic plan could act in a defensive way, as a defensive text, has not been discussed in the literature previously, and yet it is an understandable reaction when plans are required by someone in a position of power for reasons that are either obscure or simply disagreed with. Conventionally, we

assume that strategic plans are written to be implemented, and yet we know that strategies are seldom implemented in the ways depicted in plans (Langley and Lusiani, 2015; Wolf and Floyd, 2017). So how do defensive plans act? A defensive strategic plan acts partly through its existence; it exists, therefore, it acts. More specifically, it acts through its associations as it repels close scrutiny and critical engagement. It does not invite readers to explore its detail and probe its content, it is structured in such a way as to brook no enquiry and yet to appear authoritative. A defensive strategic plan does not seek to determine the actions of those it purportedly addresses; the SMD strategic plan, in a classical strategy sense, would have been aimed at the academics in the department, and yet defensive texts do not act in this way. The real audience for defensive texts may not be known when they are authored. They are written for others that may access and read them in some unknown future and are crafted with this potentiality in mind (Clough, 2009). Consequently, for a defensive strategic plan to succeed in acting defensively, it must be accepted as legitimate and there are two tactics that can be used to help ensure that this happens.

Those who author strategy also authorize it. And yet, while a text may have a single author identified as its creator, its emergence results from a multiplicity of affects that make a difference to how it looks and to what it contains (Pye, 1995). My subject positions as strategy academic and head of department clearly leant authority to my authoring. When I sent the draft strategy out for comment to departmental colleagues, who I am and the roles I undertake in the business school would have influenced how the text was perceived. In addition, it may have been that the dean felt that they could not question the strategy that had been written by a senior strategy academic, although I doubt this. Alternatively, the strategy I authored could have been seen by the dean as simply an input for them to complete one of their own objectives; allowing them to 'tick the box' of that task; I have no way of knowing. Second, the strategic plan I constructed conformed to genre expectations (Langley and Lusiani, 2015), which meant that it followed previously established stylistic conventions. This was achieved through it mirroring with some minor changes that produced the year before by my predecessor, and I wrote a strategy of four pages, which conformed to the dean's only expressed criteria. In short, for strategies to be seen as legitimate it helps if they are recognizable as strategies – they look like how they are expected to look and they conform to established genre conventions. So, for a text to be accepted as a strategy, if it is authored by a strategy academic and resembles in appearance the strategy produced the previous year then the likelihood that it can act in the way intended increases.

Strategy work affects, is affective and affected

Strategy work is an affective undertaking. When strategy work is accomplished, be it writing a plan, participating in a workshop, or attending the unveiling of a new strategy, it is assumed that such acts will have consequences; meaning there will be affects. A plan will have consequences, the workshop will have outcomes, a new strategy will affect the actions of those exposed to it (Mussumi, 2002; Thrift, 2007). However, as this research highlights, strategy work itself is affected by those who accomplish it, and its affects can be unintentional and counter to those anticipated. To say that strategy work is affective signifies that it is imbued with potentiality (Clough, 2009). This means that as a potentiality when strategists complete their strategy work it will not be known beforehand how they, as social and material beings, will affect what they do or how they will be relationally affected by what they do. Certainly, my strategy work of writing a departmental strategic plan affected my becoming (Thrift, 2007), how I viewed business school management and how I consider we teach strategy to our students. So, strategy is affected by those who complete it, but strategy will also affect those it implicates and targets. And yet, those

affects cannot be known *a priori* and only emerge in the relational co-constituting that materializes strategy in organizations.

As this autoethnography reveals, multiple materialized realities need to co-exist for organizational strategy work to unfold. And, unlike how plurality in strategy research has been conceived (Denis et al., 2001, 2007; Jarzabkowski and Fenton, 2006), they interfere and affect one another. For example, I sensed that the dean who asked me to produce a strategy had an image in mind (more than it being four or five pages long) that made strategy real to them. By requiring me to write a strategy, what I assumed to be their conceptual framing of strategy affected in an intense force-like manner how I thought and felt about the task I had passively accepted (Beyes and Steyaert, 2021; Ott, 2017). This affecting moved me to act. My judgement, based upon the discussions I had had, had witnessed or had related to me was that the dean viewed strategy primarily as a tool of control. I inferred that the dean saw strategy as a mechanism through which a disciplining command-and-control style of management could manifest, as it would facilitate the control of academics' actions. So, my strategy work in producing a strategic plan included acts of resistance (Ezzamel and Willmott, 2008) aimed at withstanding what I interpreted as attempts to propagate a neoliberal managerialist agenda. More empirical research is called for that frames strategy as affect, and that is sensitive towards the sensorial, embodied, instinctive and intense force-like moves (Clough, 2009; Massumi, 2002; Ott, 2017) of strategists as they do their work.

Autoethnography

As has been demonstrated, autoethnography is well suited to enabling fresh insights (strategy work as affect, reluctant strategist, defensive text) into phenomena with which we have become comfortable in our knowledge. The practice turn (Schatzki, Knorr Cetina, and Von Savigny, 2001) in MOS is now well-established, but one danger is that it can leave us believing that we know what practice is; we think we know what it is that people, in this case strategists, in organizations do. When I began assembling my notes in preparation to write this research I was surprised at what I had experienced and I was shocked at how little of it could be found in the existing literature that viewed strategy as a practice. It contained scant reference to practice as an affectively tuned phenomenon (Beyes and Steyaert, 2021; Gherardi, 2017). Indeed, Kohtamäki et al.'s (2022) recent review article contains little I could directly connect to my experience. Of course, it could be that my practice is an extreme outlier and does not resonate with middle managers elsewhere. However, based on the feedback I have received from academics, practising managers and students when I have presented this work, my experience is more common and relevant than the strategy literature would suggest. It is also revealing that nothing of my doing strategy is included in the teaching materials I use. I suspect that in my teaching I position strategy as a calculable process that assumes an idealized organizational context that would bear little relation to the confusing and confused worlds of practice our students are likely to encounter upon graduation.

Autoethnography is one way through which academics can better understand the logics of their own practice (Sandberg and Tsoukas, 2011) and reinvigorate research programmes that are in danger of becoming moribund (Jarzabkowski et al., 2021). The taboo around telling our own stories (Anteby, 2013; Ashcraft, 2008), is partly a self-imposed one. For numerous reasons, including fears over the effects on our future careers, our reluctance to reflect upon our teaching, administrative and managerial activities represent hugely significant missed opportunities. Through autoethnography we can understand the topics we write about in much richer ways, and can benefit students by drawing on our experiences in our teaching.

However, autoethnographers must also be reflexive about their research. Therefore, I cannot, of course, remain blind to my own coercive, interference activities, which centred upon how I sought

to exert an affective influence on academic colleagues in SMD. In presenting the task in the way that I did, as me protecting them from a real or imagined senior managerial foe, I strived to shape their affective responses – to move them to act in ways supportive of my objective. I employed tactics, such as drawing from each academic's annual review, to present a strategy that they would recognize and sensorially identify with. At the 19 October departmental meeting, I explained that I didn't think we needed a departmental strategy – thereby, locating myself as 'one of them' rather than a distant manager – but, as it was required of me, I would try to do it with as little collective pain as possible. I realize that I helped to get department staff 'on-my-side' by explaining the predicament I (they) was (were) in and how I planned to get (us) out of it. I did not seek to gain input on what the strategy should be, but for them to make what I had produced better-worded and therefore more acceptable for the dean.

However, as with all approaches to crafting knowledge, autoethnographies have their limitations. Paramount, is the thorny issue of generalization, mentioned earlier. It would be inappropriate for autoethnographers to claim generalizability for their work; autoethnographies are far too specific and situationally occurring for that. Instead, readers should be able to relate to the accounts offered, which this present research achieves in two substantive ways. First, is that while an analytic autoethnography, autoethnographies of this type should still be evocative of the experiences offered that resonate as both plausible and verisimilitudinous with their intended audience. Second, analytic autoethnographies should also provoke readers to at least question their accepted ways of seeing things, in this case strategy work, and through such acts we can hopefully guard against the assumption that we 'know' what the practice of strategy is and can no longer be surprised by what we discover.

Conclusion

This study advances several important contributions and insights. Strategic plans are back in vogue (Wolf and Floyd, 2017) – perhaps they never went away – and the roles identified for them, how they are intended to act and how they actually act, need reappraising. The idea that a strategic plan can be a defensive text needs further exploration. Discussions I have had about it with strategy consultants, academic colleagues and students indicate it is far more prevalent than we may suspect. We also need to know about what other defensive work reluctant strategists engage in. This autoethnography has focussed on the writing of a department strategic plan, but there are likely other strategy work reluctant strategists are required to undertake that would reward critical enquiry.

Those that get involved and do strategy work are strategists who undertake certain actions, but this framing lacks nuance. First, what strategy work is *actually* done in organizations needs exploring and investigating. This means we have to reassess what we mean by strategy and resist the temptation for us, as researchers, to judge whether what practitioners are doing is strategy work or not (Jarzabkowski et al., 2021). This has been our stance for too long and has led to strategy academics laying comfortable claim to the legislator role Knights and Morgan (1991) identified over 30 years ago. Rather, we need to be more willing to follow practitioners in *their* strategy work and seek to understand how *they* undertake strategy work as affective accomplishments. In investigating the strategy work strategists accomplish we should make certain that we do not neglect to interrogate strategy itself. Ethnographies and, of course, autoethnographies are ideal approaches that can allow us to reflexively observe how strategy work is done and, as has been demonstrated, can produce novel and challenging insights about a topic with which we have become so familiar.

Second, whether strategists are senior managers, middle managers or external strategy consultants, they tend to be portrayed as disembodied and unaffected actors unencumbered by diverse

motivations, preferences and attitudes (see Bourgoin et al., 2020, for an exception). This framing needs dismantling. I was a reluctant strategist, emplaced in the context of being a newly appointed head of department that included experts in the strategy work I was tasked with undertaking. I felt the precariousness of my position and acted with this in mind. There will be other reluctant strategists working in organizations, and we need to know more about how they cope with their pressures, obligations, conflicts and concerns. We still know surprisingly little about the many and varied embodied, emplaced and affected actors that strategize, this needs to change for our understanding of who strategists are and how strategy work is accomplished to mature. Researchers should no longer ignore the deeper questions about how strategy work affects strategists and how strategists affect it.

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Notes

1. Bourgoin et al.'s (2020) fine recent article is more 'ethnography' than 'auto'.
2. The 'naughty step' is a colloquial expression that refers to the action a parent may take to punish a child when they are deemed to have misbehaved. To have been put on the 'naughty step', either literally or figuratively, means to have their movement restricted, so that they have time to think about what they have done. Taking 'time out' denotes a similar action, although the term 'naughty step' has stronger parent/child connotations.

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